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ABSTRACT

At New Mexico State University, technical communication teachers have developed a course to teach editing processes to graduate students who take the advanced workshop in technical and professional communication. In this seminar group, students work on writing processes; editing processes; written, edited, and tested products; and oral processes and products. Special consideration is given to M.F. Buehler's levels-of-edit, which include combinations of nine types of editing activity: coordination, policy, integrity, screening, copy clarification, format, mechanical style, language, and substantive. These types are then combined into levels that are used according to the kind of editing needed for publication. Before students engage in editorial dialogues with a writer, they read articles that offer techniques to enable them to talk with, not at, writers. Articles might include those by Mary S. Hageman, Louise M. Vest, and Patrick M. Kelley. The final activity requires the students to conduct research on editing processes and to develop their own theory of editing. After reviewing the literature, students then combine their research with a description of their editing processes. (HOD)

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EDITING IN TECHNICAL COMMUNICATION: THEORY AND PRACTICE IN EDITING PROCESSES AT THE GRADUATE LEVEL

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Efficient and effective editors of technical communication are made, not born. But to become efficient and effective, these editors must be aware of the theory and techniques of editing. Techniques, of course, can be learned in actual practice in editing, but the theory and techniques can also be learned from courses that are organized to teach editors how to edit efficiently and effectively. Such courses,though, need to be set up so that students examine research on editing, practice editing, and develop their own theories and practices of editing.

At New Mexico State University, we teachers of technical communication have developed such a course to produce efficient and effective editors. For graduate students who take the Advanced Workshop in Technical and Professional Communication at NMSU, we have developed techniques to teach editing processes.

Our advanced workshop in technical and professional communication is limited to 10 students in each course. In this seminar group, students work on writing processes; editing processes; written, edited, and tested products; and oral processes and prod-

ucts. To teach the editing portion of the course, we concentrate on two main activities:

> (1) Developing and using levels-of-edit and editorial dialogue in editing workshops, and
>
> (2) Developing theories of editing process through research and experience.

The first activity is accomplished within the editing workshop by all the students; the second activity is accomplished by each individual graduate student.

Development of Editing Techniques in the Group

In the group workshop, my students and I develop and use levels-of-edit and examine and use editorial dialogue to edit papers throughout a semester.

Levels-of-Edit and Types of Edit. To develop techniques for editing papers in our workshop, my graduate students and I examine several articles on editing. Some of those articles are nicely collected for us in a 1981 issue of Technical Communication, a special issue on technical editing.* The issue contains useful articles by Lola Zook, Don Bush, Alberta Cox, Harold Osborn, Eva Dukes, Lee Shimberg, and Mary Fran Buehler. We concentrate on Buehler's essay** and on one that Buehler wrote in 1977.***

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*Volume 28, Number 4 (Fourth Quarter 1981).

**"Defining the Terms in Technical Editing: the Levels-of-Edit as a Model." Technical Communication 28, no. 4 (Fourth Quarter 1981): 10-14.

***"Controlled Flexibility on Technical Editing: the Levels-of-Edit Concept at JPL." Technical Communication (First Quarter 1977): 1-4.

Buehler's essays provide us with an organized approach to editing. In her essays, Buehler explains a concept of "levels-of-edit" that she developed for the Jet Propulsion Laboratory. The concept involves defining types of editing and then combining them into different levels according to the amount of editing needing in a manuscript.

Buehler's levels-of-edit include combinations of 9 types of editing activity: coordination, policy, integrity, screening, copy clarification, format, mechanical style, language, and substantive. These 9 types are combined into 5 levels, which are used according to what is needed for a publication at JPL. A level 1 edit, for instance, would involve all 9 types of edit while a level 5 edit would mean only two types of editing would be needed on a manuscript.

Most of Buehler's "tag" words for the types of editing are easily understood though overlapping seems to exist. For a "coordination edit," an editor coordinates or schedules and monitors production processes for a manuscript. For a "policy edit," the editor insures that the manuscript reflects the company's policy on parts of a report, references, and units of measurement. For "integrity edit," and editor checks that the parts of a publication match. "Screening edit" is a minimal language and graphics edit. "Copy clarification" refers to legible copy. For a "format edit," the editor marks a manuscript for correct format. In "mechanical style edit," the editor checks for correct and consis-

tent usage. For a "language edit," the editor considers all aspects of language. For a "substantive edit," the editor reviews the manuscript for content, coherence, emphasis, subordination, and parallelism.

Buehler's types and levels are particularly suited to manuscripts at the Jet Propulsion Laboratory. In turn, my adaption of the concept of levels-of-edit is particularly suited to manuscripts edited in graduate workshops. Editing experiences in workshops have shown me that editors need organized approaches to editing, especially when ten people are doing the editing with one writer. Because a "shot gun" approach to editing would only confuse a writer, I have my students determine main areas that need emphasis in editing a manuscript. If the editing is not organized, beginning editors cover various areas in a manuscript in a hit-or-miss fashion as they jump from a content weaknesses to a subject-verb disagreement to a format inconsistency to a graphics problem to a parallelism error to a paragraph misplaced to a word misspelled. If 10 people are using the hit-and-miss approach at once, the writer understandably feels overwhelmed and totally confused. Therefore to organize editing sessions early in a semester, I have my students develop guidelines for editing. After they have read Buehler's essays, we decide main areas to examine for editing a manuscript.

Invariably, we come up with seven areas (and if a group of students forgets one of them, I add it). The seven areas or types of

editing include content, structure, style, format, mechanics, tone, and policy. For each type, we then define the type and develop questions that can be used by an editor to edit a manuscript. This semester my workshop students and I developed these definitions and questions for each type of editing.

Levels of Edit for Workshops and Questions for Each Type

Content ---------- Knowledge of subject matter and transfer of that knowledge, information, or message

1. Is information or a message being transferred to the reader?
2. What is the message?
3. Are specific details provided to explain or prove generalizations?
4. Have the best materials been selected to explain the message?
5. Are the ideas explained fully?
6. Are unnecessary materials included to explain the message?

Structure ---------- Organization of the whole piece of writing, of each section, and of each paragraph with clear beginnings, middle parts, and endings

1. Can a definite structure be seen in the piece of writing?
2. Is that structure logical?
3. Is another structure better for the material?
4. Does the introduction set up all the parts?
5. Do the middle sections fulfill the promises of the introduction?
6. Is there logical coherence between the parts?
7. Does the conclusion summarize all the parts?

Style ----------Pattern of sentences and use of words

1. Is the writing clear?
2. Is the writing concise?
3. Is the writing strong?
4. Are the style of sentences and use of words appropriate to the subject?
5. Does the style interfere with the intended message?
6. Is the language appropriate for the intended audience?
7. Does the writer use effective parallelism and subordination and coordination?
8. Is there an absence of wordiness and compound noun phrases and redundancy?
9. Is there good use of specific verbs, adverbs, and adjectives to suggest action?
10. Is there good use of a specific agent for an action to help avoid unnecessary passive constructions?
11. Is the diction clear, concise, and connotative?

Format ----------Specialized physical arrangement and appearance of specific pieces of writing

1. What format is used for the piece of writing?
2. Is the format appropriate for the material?
3. Is that format the correct format for a report or a memo or an article or a proposal or a thesis or a class paper?
4. Are the graphic aids effectively prepared and placed in the piece of writing?
5. Are the headings used correctly and spaced correctly?
6. Is the material referenced correctly?
7. Are footnotes or citations used correctly?
8. Is the bibliography or list of references set up correctly?
9. How can the general appearance of the piece of writing be improved?

Mechanics ----------Use of language according to established rules of grammar

1. Is the grammar of all the sentences correct?
2. Are the sentences structured correctly?
3. Are all the words spelled correctly?
4. Are punctuation marks used correctly?
5. Are typical errors avoided such as
   subject-verb disagreement,
   dangling modifiers,
   incorrect pronoun reference,
   pronoun-antecedent disagreement,
   shift in verb tense,
   incorrect parallelism, and
   poor subordination?

Tone ----------Voice of the writer or persona of the writer

1. Is the tone appropriate for the subject and the audience?
2. Is the writer present in the writing?
3. Should personal pronouns be used?
4. Is a persona created for the writer in the writing?

Policy ----------Conventions that the writer should follow for a journal or company or organization

1. What policy conventions should the writer be following for the publishing agent or for the intended audience?
2. Are those conventions followed?
3. Is the writing non-sexist?
4. Is the writing non racist?
5. Is the writing non-ageist?

Loosely using Buelher's concept of levels-of-edit but reversing it, we then determine that a 7-level edit includes all types of edit, a 6- level edit includes any 6 types, a 5-level edit includes any 5 types and so on. Then for an editing workshop, students read a manuscript written by another student, determine which types of edit and how many types need to be worked on, comment in writing in the text of the manuscript, and provide an overall reaction to the writing with suggestions on what types need the most work.

In the actual workshops, we then agree on which types of edit in a manuscript need the most work, which level-of-edit we will be involved with. Usually as a group we concur that a three or four level-of-edit is needed. Very rarely do we decide that a 7 level edit is needed because by the time that we are editing papers in the course, students are quite aware of what editors will be concentrating on and work hard in their writing on the areas that we will be examining.

Then, if a manuscript needs a two or three or four level-of-edit, we decide which area needs the most work and concentrate on that area until it has been fully discussed by all the editors with the writer. We also examine other areas of editing that need the most work. Near the end of the editing session, we may make comments on minor revisions needed in the remaining types of edit. In this way, we organize the editing session so that the most important types of editing are concentrated on for that particular

manuscript and so that the writer is not overwhelmed with disorganized comments.

Editorial Dialogue. Organizing the editing sessions is not enough. To produce worthwhile editing sessions in the workshops, I have my students use editorial dialogue to confer with a writer. Before any editing is done in the course, my students read articles published by Mary Sigurdson Hageman, Louise Merck Vest, and Patrick M. Kelley.*

The articles on editorial dialogue provide techniques that enable the workshop editors to work on talking with, not at, the writers. Editorial dialogue enables the workshop editors to work at making an editing session, not a hatchet job, but a team effort as editors and writer discuss together the editing that is needed in a piece of writing. Editorial dialogue enables editors and writers to work as partners as the editors suggest changes to improve the writers' manuscripts. As explained by Hageman, Vest, and Kelley, editorial dialogue emphasizes empathy and respect of

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*Mary S. Hageman, Louise M. Vest, and Patrick M. Kelley. "Editorial Dialogue: An Alternative Writer-Editor Relationship." In Proceedings of the 28th International Technical Communication Conference, pp. W-38-40. Washington, DC: Society for Technical Communication, 1981; Kelley. "Charting a New Course for Technical Writing and Editing: Technical Writing and Editing as Dialogue." In Proceedings of the 29th International Technical Communication Conference, pp. W62-65. Washington, DC: Society for Technical Communication, 1982; Vest and Hageman. "Developing an Alternative Writer-Editor Relationship: A Workshop in Editorial Dialogue." In Proceedings of the 29th International Technical Communication Conference, pp. W106-109. Washington, DC: Society for Technical Communication, 1982.

one person for another in the editor-author relationship.

Editorial dialogue makes use of Richard L. Johannesen's components of dialogue, which include the following

> (1) genuiness or being yourself and expressing what you think and feel not what you think you ought to express,
>
> (2) accurate empathic understanding or comprehending and understanding the other person in a relationship,
>
> (3) unconditional positive regard or affirming the other person as a partner in dialogue,
>
> (4) presentness or being consciously and actively present in a dialogue and concentrating on the other person,
>
> (5) spirit of mutual equality or seeing the other person as an equal, and
>
> (6) supportive psychological climate or communicating without preconceptions.*

These components of dialogue as explained by Vest and Hageman can be used in an editing session through the following techniques:

> (1) "Receptive listening" or the editor actively listening to the writer and asking questions and the writer actively listening to suggestions;
>
> (2) "Guide for Analysis" or the editor using a guide** to check what has been done and the writer using a guide to see what needs work;
>
> (3) "Notetaking" or the editor taking notes as the writer talks so that the writer's words will be used in a revision;
>
> (4) "Role Mirroring" or both the editor and writer taking the other's role to understand problems.***

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*Hageman, Vest, and Kelley, pp. W39-40; Kelley, pp. W64-65.

**Vest and Hageman develop a guide for the writer to check his or her audience, purpose, tone, structure, and style. My stu-

To use editorial dialogue, my student editors and I work to build a positive relationship with a writer to help the writer successfully transfer information to readers. The editorial dialogue allows us to make our editing sessions a team effort that is also a humane effort while the concept of levels-of-edit allows us to organize our criticisms and suggestions.

Development of Theories of Editing Processes

In addition to working on team editing through the levels-of-edit and editorial dialogue, the graduate students who are in the technical communication programs at NMSU are required to do research on editing processes. If they are taking the graduate workshop for the second time--students may take the workshop four times for a total of 12 credit hours--if they are taking the workshop for the second time, they are asked to describe their theory of the editing process. They are given the following assignment:

> In the semester that you take English 577 for the second time, study editing processes in technical and professional communication to develop a knowledge of theory on editing process and to develop your own theory on editing process.
>
> Complete the following reading and writing assignments.
>
> 1. Read articles and books on editing.

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dents use the questions that we have developed for each type of editing.

***Vest and Hageman, pp. W107-108.

> 2. Then write an essay for the technical communication professors and the graduate students in the NMSU technical communication program (or for publication) on your literature search and on your theory of the editing process in technical and professional communication. For your written essay include a literature review of the reading materials with the explanations of your own theory of editing process. Either make the literature review a separate section of your essay or integrate it into the developed explanation of your theory.

The word "theory" is used in this assignment to mean a proposed explanation, perhaps conjectual, to explain the operation of certain acts or behaviors. It is used in the sense of a looking at, a contemplating, a speculating of how something operates or how something is done. It is a view, a perception of reality, an attempt to describe reality, the reality being the editing process.*

For their research on editing processes, I give students a bibliography for beginning their literature searches. The bibliography, which is presented in the Appendix, contains titles of articles and books on editing. I also urge students to use the lists of references at the end of the articles and books for titles of other sources. I urge them to check technical communication journalals, such as Technical Communication, The Technical Writing Teacher, Journal of Technical Writing and Communication, and Pro-

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*Those purists who would use a stricter definition of "theory" should realize that the definitions used here are similar to the more usual definitions of the word as given in such dictionaries as Webster's New Twentieth Century Unabridged Dictionary and Webster's Third New International Dictionary and in such articles as Janet Emig's "Inquiry Paradigms and Writing" (College Composition and Communication, February 1982, pp. 64-75).

ceedings of ITCC. The two most useful sources are Technical Communication and the STC publication Technical Editing: Principles and Practices, edited by Lola Zook in 1975. I suggest also that the students have computer searches done. In addition I suggest that they consider their editing practices in the past and present jobs that they have or have had as technical editors and their editing practices in their present work in our workshops. I suggest that they examine other people's editing processes.

The students then combine their research with a description of their editing processes. Often times students are able to use their own experiences at jobs as technical writers and editors to explain their theories of editing processes. For instance, Marie Richardson combined research with her own editing experience at the Atmospheric Sciences Laboratory to explain her theory of editing process. Marie's process includes four stages: (1) "reviewing" or determining the areas to be edited, (2) "repairing" or making necessary changes in each type of editing, (3) "conferring" or discussing the manuscript with the author, and (4) "evaluating" or reviewing the edited product. Another student, Mary Lou Vocale, described her editing process in three stages: (1) "getting in shape" (which includes developing editorial attitudes, editorial competency, and editorial thinking), (2) "finding the problems" (which includes reading through a manuscript twice, first for understanding of content and second for locating possible problems), and (3) "solving the problems" (which includes suggestions to the writer to insure the transfer of information to an audi-

ence). A third student, Martha Delamater, explained that her editing process consists of understanding the nature of editing, finding and correcting barriers in a manuscript through three readings, and convincing authors of needed revisions. A fourth student, Susan Bagby is developing a theory based on the concept that an editor must discover facts in a manuscript (facts on content, structure, and style) to be able to explain what is wrong with a manuscript and how it can be improved. Susan explains an editing process that has 5 stages: (1) Read the manuscript to obtain a general idea of content and to underline grammatical errors to discover if a pattern of grammatical errors exists; (2) Outline the manuscript by finding out what the structure is and by commenting on it; (3) Edit the manuscript for content by indicating what needs more support and for structure by indicating where logic could be strengthened; (4) Edit the manuscript for composition to suggest objectively revisions in style and emphasis in sentences and paragraphs; and (5) Comment to the author on major and minor problems in the manuscript and suggest possible revisions. Another student, Robert Toland, is currently using his experiences in the graduate workshop and his past work at Owens-Corning to develop his theory of editing process.

Summary

The work in editing insures that graduate students become aware of editing processes through experience and research, through practice and theory. By developing and using levels-of-edit and

editorial dialogue in editing workshops and by researching and examining their own and other people's techniques, the students develop their own theories of editing processes. Thus, through their group editing and through their individual editing experiences and their individual research, our students become efficient and effective editors.

APPENDIX

SELECTED RESOURCES ON EDITING PROCESSES

PREPARED BY
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Abshire, Gary M., and Dan Culberson. The Art of Technical Writing and Editing. Report 05.225. Boeblingen, Germany: IBM Corporation, 1978.

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